

UNITED STATES DISTRICT COURT
WESTERN DISTRICT OF TENNESSEE
MEMPHIS DIVISION

IN RE REGIONS MORGAN KEEGAN ERISA)
LITIGATION) Case No. 2:09-md-02009
)
)
This Document Relates to:)
)
In Regions Morgan Keegan ERISA Litig.,)
Case No. 2:08-cv-2192-SHM-dkv)
_____)

**JOINT STIPULATION FOR ENTRY
OF REVISED SCHEDULING ORDER**

WHEREAS, on May 11, 2011, the Court issued a Scheduling Order, setting forth various deadlines for the management and progression of this litigation (Doc. 223).

WHEREAS, on August 2, 2011, the Court granted the parties' Joint Stipulation and Order for Entry of a Revised Scheduling Order, which altered certain of those deadlines (Doc. 257).

WHEREAS, the Parties have been actively engaged in discovery since entry of the foregoing orders, including discovery related to class certification.

WHEREAS, given the current status of discovery, and in light of the imminent deadlines for briefing on class certification, the Parties have conferred regarding a revised case management schedule and do hereby stipulate to and propose the following revised schedule:

ESI NEGOTIATION:

January 16, 2012	Deadline for completion of all negotiations pertaining to the scope, nature and extent of ESI production. In the event the parties are not in agreement as of January 16, 2011, they shall submit any disputes to the Magistrate Judge assigned to this matter.
------------------	---

CLASS CERTIFICATION:

March 16, 2012	Deadline for completion of all discovery related to class certification.
May 4, 2012	Deadline for Plaintiffs to move for class certification
July 10, 2012	Deadline for Defendants' response to Plaintiffs' motion for class certification.
August 17, 2012	Deadline for Plaintiffs' reply in support of their motion for class certification.

FACT DISCOVERY:

August 10, 2012	Deadline for completion of all written discovery and document production, including ESI.
December 14, 2012	Deadline for completion of fact discovery.

MEDIATION:

December 14, 2012	Deadline for mediation.
-------------------	-------------------------

EXPERT DISCLOSURES:

January 31, 2013	Deadline for Plaintiffs' expert witness disclosure.
March 4, 2013	Deadline for Defendants' expert witness disclosure.
March 18, 2013	Deadline for Plaintiffs' rebuttal expert disclosures.
April 18, 2013	Deadline for completion of expert discovery.

DISPOSITIVE MOTIONS:

July 1, 2013	Deadline for filing dispositive motions.
September 3, 2013	Deadline for responses to dispositive motions.
October 3, 2013	Deadline for replies to dispositive motions.

TRIAL:

January 31, 2014	Deadline for the Parties to be prepared to proceed with trial.
------------------	--

The Parties so stipulate and submit herewith a proposed order for approval.

Presented by:

s/ Margaret E. Wetherald

Lynn L. Sarko

Derek W. Loeser

Margaret E. Wetherald

KELLER ROHRBACK L.L.P

1201 Third Avenue, Suite 3200

Seattle, WA 98101-3052

Tel.: (206) 623-1900

Fax: (206) 623-3384

Email: lsarko@kellerrohrback.com

dloeser@kellerrohrback.com

mwetherald@kellerrohrback.com

Interim Co-Lead Counsel for the Class and Co-Counsel for Plaintiffs Harrison, C. Smith and J. Smith

Ellen M. Doyle

John Stember

Stephen M. Pincus

STEMBER FEINSTEIN DOYLE

& PAYNE, LLC

1705 Allegheny Building

429 Forbes Avenue

Pittsburgh, PA 15219

Tel: (412) 281-8400

Fax: (412) 281-1007

Email: edoyle@stemberfeinstein.com

jstember@stemberfeinstein.com

spincus@stemberfeinstein.com

Interim Co-lead Counsel for the Class and Co-Counsel for Plaintiffs Hamby and Jackson

R. Carlton Smyly
**CABANISS, JOHNSTON, GARDNER
DUMAS & O'NEAL, LLP**
Suite 700, Park Place Tower
2001 Park Place North
Birmingham, AL 35203
Phone: (205) 716-5200
Fax: (205) 716-5389
Email: rcs@cabaniss.com

*Counsel for Plaintiffs C. Fred Daniels, as Trustee
ad Litem for the Alice C. Cade for the Benefit of
Carroll Corbin Bays Trust, et. al.*

s/ Richard J. Davis

William B. Wahlheim, Jr. (pro hac vice)
Richard J. Davis (pro hac vice)
John David Collins (pro hac vice)
MAYNARD COOPER & GALE, PC
1901 – 6th Avenue North, Suite 2400
Birmingham, AL 35203-2602
Tel.: 205-254-1068
Fax: 205-254-1999
wwahlheim@maynardcooper.com
rdavis@maynardcooper.com
jcollins@maynardcooper.com

Michael J. Prame (pro hac vice)
Sara Zumwalt (pro hac vice)
GROOM LAW GROUP, CHARTERED
1701 Pennsylvania Avenue, N.W., Suite 1200
Washington, DC 20006-5811
Tel.: 202-857-0620
Fax: 202-659-4503
tff@groom.com
szumwalt@groom.com

David B. Tulchin
David E. Swarts
Margaret E. Bartlett
SULLIVAN & CROMWELL, LLP
125 Broad Street
New York, NY 10004
Tel.: 212-558-4000

Counsel for the Regions Defendants

s/ Robert E. Craddock, Jr. _____

Robert E. Craddock, Jr. (TN #5826)

Kristen Mistretta Wilson (TN #24606)

WYATT, TARRANT & COMBS, LLP

1715 Aaron Brenner Drive, Suite 800

Memphis, TN 38120-4367

Tel.: 901-537-1000

Fax: 901-537-1010

rcraddock@wyattfirm.com

kwilson@wyattfirm.com

*Counsel for Defendants Kemmons Wilson, Jr. and
Michael S. Starnes*

s/ W. Brantley Phillips, Jr. _____

W. Brantley Phillips, Jr.

Michael L. Dagley

BASS BERRY & SIMS PLC

150 Third Avenue South, Suite 2800

Nashville, TN 37201

Tel.: 615-742-6200

Fax: 615-742-2803

mdagley@bassberry.com

bphillips@bassberry.com

Shepherd D. Tate

Michael A. Brady

BASS BERRY & SIMS PLC

100 Peabody Place, Suite 900

Memphis, TN 38103-3672

Tel.: 901-543-5900

*Counsel for Defendants Morgan Keegan & Co.,
Inc., MK Holdings, Inc., Morgan Asset
Management, Inc., Allen B. Morgan, Jr., J.
Kenneth Alderman, G. Douglas Edwards, and
Brian B. Sullivan*

CERTIFICATE OF SERVICE

I hereby certify that on November 4, 2011, a true and correct copy of the foregoing was sent via electronic and first-class mail, postage prepaid to:

<p>Michael J. Prame Sara Zumwalt GROOM LAW GROUP, CHARTERED 1701 Pennsylvania Ave., N.W., Suite 1200 Washington, DC 20006-5811 Phone: 202-861-5432 Email: mprame@groom.com szumwalt@groom.com</p> <p><i>Counsel for Regions Financial Corporation, Regions Bank, Ken Alderman, George W. Bryan, John Buchanana, Earnest W. Deavenport, Jr., David B. Edmonds, Irene Esteves, Christopher Glaub, O.B. Grayson Hall, Jr., Tim Laney, Susan W. Matlock, Claude Nielson, C. Dowd Ritter, David Rupp, Jill Shelton, Lee K. Stylslinger, III, Tom Thompson, David Turner, Barbara H. Watson, William C. Wells, II., Henry Dinken, John Daniel, W. Charles Mayer, III, Ronnie Jackson, Sharon Davis, Sherry Anthony, Martha Ingram, Alan Deer, Candace Bagby, Alton Yother, Tusa McNary, Kemmons Wilson, Jr., E.W. "Rusty" Stephenson, Michael Stearns, Bryan Jordan, Lea Stokes, Susan Martinez, James S.M. French</i></p>	<p>William B. Wahlheim, Jr. Richard J. Davis John David Collins MAYNARD COOPER & GALE, PC 1901 – 6th Avenue North, Suite 2400 Birmingham, AL 35203-2602 Phone: 205-254-1068 Fax: 205-254-1999 Email: wwahlheim@maynardcooper.com rdavis@maynardcooper.com jcollins@maynardcooper.com</p> <p><i>Counsel for Regions Bank & Regions Financial Corporation (Local Counsel)</i></p>
<p>W. Brantley Phillips Matthew M. Curley Michael L. Dagley Wendee M. Hilderbrand BASS BERRY & SIMS PLC (Nashville) 150 Third Avenue South, Suite 2800 Nashville, Tennessee 37201 Phone: (615) 742-7790 Fax: (615) 742-2868 Email: bphillips@bassberry.com mcurley@bassberry.com mdagley@bassberry.com whilderbrand@bassberry.com</p> <p><i>Counsel for Morgan Asset Management, Inc. & Morgan Keegan & Company, Inc.</i></p>	<p>Michael A. Brady Shepherd B. Tate BASS BERRY & SIMS PLC (Memphis) 100 Peabody Place, Suite 900 Memphis, TN 38103 Phone: 901-543-5900 Fax: 901-543-5999 Email: mbrady@bassberry.com state@bassberry.com</p> <p><i>Counsel for Morgan Asset Management, Inc. & Morgan Keegan & Company, Inc.</i></p>

<p>Robert E. Craddock, Jr. (TN #5826) Kristen Mistretta Wilson (TN #24606) WYATT, TARRANT & COMBS, LLP 1715 Aaron Brenner Drive, Suite 800 Memphis, TN 38120-4367 Phone: 901-537-1000 Fax: 901-537-1010 Email: rcraddock@wyattfirm.com kwilson@wyattfirm.com</p>	
---	--

*Counsel for Defendants Kemmons Wilson, Jr.
and Michael S. Starnes*

DATED this 4th day of November, 2011.

s/ Margaret E. Wetherald

Margaret E. Wetherald, *Pro hac vice*